

# Invitation to Tender

ITT Reference	EGP005		
Tender for	Essex Growth Programme Evaluation		
Date issued	3 <sup>rd</sup> December 2018	Submission deadline	14 <sup>th</sup> December 2018
Contact details	andrew.wilson@nwes.org.uk		

## Invitation to Tender

Norfolk & Waveney Enterprise Services Ltd (Nwes) invites tenders for an External Evaluation of the Essex Growth Programme. The scope of services to be provided and the way you should respond are defined in this document.

## TENDERING INSTRUCTIONS

### 1.1 Overview

- 1.1.1 It is your responsibility to obtain, at your own expense, all information necessary for the preparation of your tender.
- 1.1.2 Should you be in doubt as to the interpretation of any part of the Invitation to Tender documents, please contact the individual, below, by email in the first instance who will endeavour to answer written queries submitted before 5pm on 7<sup>th</sup> December 2018. Contact details are: Andrew Wilson, 07787 521890, [andrew.wilson@nwes.org.uk](mailto:andrew.wilson@nwes.org.uk)
- 1.1.3 Responses to queries will be made in writing. If you would like to be included in responses made to questions, please advise the above by email to [andrew.wilson@nwes.org.uk](mailto:andrew.wilson@nwes.org.uk)
- 1.1.4 The tenders will be evaluated against the criteria stated within Section 1.8 of this document.
- 1.1.5 The tender must remain open for acceptance for a period of 90 days from the closing date.
- 1.1.6 Suppliers will be expected to provide references, if requested.
- 1.1.7 Tenderers will be notified by 20<sup>th</sup> December 2018 of the decision.
- 1.1.8 The costs quoted in the tender document should be itemised.
- 1.1.9 Prices should be quoted inclusive and exclusive of VAT.

### 1.2 Statement of confidentiality

- 1.2.1 The Invitation to Tender document is and shall remain the property of Nwes and must be returned on demand.
- 1.2.2 All information supplied by Nwes shall be regarded as private and confidential and may only be disclosed on an *in-confidence* basis to those who need to know or be consulted for the purpose of preparing the response.
- 1.2.3 It is appreciated that confidential information will be supplied to Nwes and a signed Confidentiality Statement is enclosed (see Section 6) which are binding on both parties. One

copy should be signed by a Director / Owner of your business and returned to Nwes as an Appendix.

- 1.2.4 The tenderer shall also complete the Form of Tender (see Section 8) and the Declaration as to Collusive Tendering (see Section 7). These should be submitted as Appendices.
- 1.2.5 E-signatures will be accepted including typewritten name in the signature box if no formal e-signature capacity exists.

### 1.3 Tendering rules

- 1.3.1 The tender proposal with all required Appendices must be submitted by email to [andrew.wilson@nwes.org.uk](mailto:andrew.wilson@nwes.org.uk) no later than 5pm on Friday 14<sup>th</sup> December.
- 1.3.2 Time of receipt by us will be taken as the submission time. We recommend you submit your response prior to the immediate deadline to avoid IT issues causing disqualification / anxiety. No late submissions will be allowed due to IT issues unless the issue is accepted as Nwes responsibility by our IT contractor.
- 1.3.3 Any tender response or part thereof which is received after the deadline for return will NOT be considered and Nwes will not consider requests for extension of the closing date and time except as outlined in 1.3.2.
- 1.3.4 All tender responses must be headed “Tender for EGP Evaluation – EGP005”.
- 1.3.5 Responses must be returned together with the Declaration of Collusive Tendering (see Section 7) and Form of Tender (see Section 8) completed.
- 1.3.6 Every tender received by Nwes shall be deemed to have been made, subject to the terms and conditions of the Invitation to Tender documents, unless the clause heading and paragraph number of any clauses to which you object have been specified in your response, together with the reason for your objection.

### 1.4 Timescale

Stage	Date
Tender documents issued	3 <sup>rd</sup> December 2018
Queries to be submitted by	5pm on 7 <sup>th</sup> December 2018
Queries Response by	5pm on 10 <sup>th</sup> December 2018
Tenders to be submitted	5pm on 14 <sup>th</sup> December 2018
Evaluation of tenders	17 <sup>th</sup> - 19 <sup>th</sup> December 2018
Tender(s) awarded by	20 <sup>th</sup> December 2018
Contract(s) commences	21 <sup>st</sup> December 2018

## **1.5 Scope of service required**

- 1.5.1 Nwes requires the services of a suitably qualified party to undertake a formal evaluation of the Essex Growth Programme. The report will need to consider the impact of the Essex Growth Programme and suggest lessons learned/good practice/opportunities which should be taken forward in subsequent delivery.
- 1.5.2 The indicative budget allocated to this activity is £8,000 plus VAT. This is the total budget whether one or more contactors are selected.

## **1.6 Form of tender**

- 1.6.1 The tender response must consist of a proposal that responds directly to all the requirements outlined in this tender document, especially in relation to Sections 1, 3, 4 and 5.
- 1.6.2 The proposal must be presented in a clear and legible format in the form of MS Word or PDF document of no more than 6 pages excluding Appendices. Appendices are limited to CV's of the team that will contribute, 1 example of a previous evaluation completed if available, the Form of Tender (see Section 8), the Declaration as to Collusive Tendering (see Section 7) and Financial Information as requested.
- 1.6.3 Arial 12 Font or larger must be used in the response proposal.
- 1.6.4 The proposal should be presented in a way that is straightforward to interpret
- 1.6.5 The proposal presented must be structured to provide:
- Background information about the organisation – or collaborating organisations – making the proposal
  - Details of relevant experience that makes the organisation / delivery team suitable to complete the evaluation. Comment should include detail on experience of ERDF/ Public Sector funded contracts, Business Support, Independent Evaluation / Audit, working with SME's, working with key stakeholders such as councils / LEP's. CV's of the delivery individual / team are to be provided as an Appendix.
  - Outline the evaluation methodology i.e. how the requirements of this specification will be met to deliver the required evaluation report.
  - Detail any added value above and beyond the outlined specification.
  - Provide a costing with breakdown of costs including day rates, days allocated to the work, travel, subsistence, printing any other costs. Please specify a price including and excluding VAT.
  - Include the contact details of at least two references relating to similar work that you have undertaken (these will be taken up at Nwes' discretion).
  - Provide a point of contact for correspondence.

## **1.7 Evaluation of responses**

- 1.7.1 Nwes reserves the right to write to or speak with tenderers for clarification of any point. Replies will be required in writing.
- 1.7.2 Tenders will be evaluated against the criteria laid down in Section 1.8 in relation to specification of requirements (see Section 3).
- 1.7.3 Tenderers will be informed of the outcome in writing/email.

## **1.8 Contract award criteria**

1.8.1 Nwes reserves the right to exclude a Tenderer should our review of the Financial Information or Due Diligence checks (see section 4.2) identify issues of concern over the Tenderer's Financial Stability or give reasonable cause to suggest that engagement could provide a reputational risk. Nwes' decision on this assessment will be final.

1.8.2 Selection of contractors will be based on the following criteria:

Relevant track record/experience:	20%
Methodology:	40%
Cost:	30%
Added Value:	10%

## **2 CURRENT STATUS**

### **2.1 Norfolk & Waveney Enterprise Services Ltd**

2.1.1 Nwes is a BIS-registered Enterprise Agency, with unrivalled experience in delivering and managing business support activities across the East of England. Formed over 30 years ago, Nwes is recognised as a leading enterprise agency in the country with experience of delivering multiple ERDF contracts. We are a social enterprise with our surplus being used to deliver our social purpose of supporting and developing the local economy.

### **2.2 The Essex Growth Programme**

2.2.1 The Essex Growth Programme completed practical delivery at the end of September 2018.

2.2.2 Building upon the success of previous Nwes-managed projects, The Essex Growth Programme has been an EU-funded project that operated throughout the county of Essex. The programme includes:

- a) an intensive start-up support service for 250+ individuals seeking to unlock their enterprise potential;
- b) free/confidential/impartial business growth support to 50+ SMEs – beyond the start-up stage and up to typically 36-months old;
- c) an innovative package of discretionary capital grant-based support for 70+ SMEs.

## **3 SPECIFICATION OF REQUIREMENTS**

### **3.1 Key requirements**

3.1.1 The report will need to consider the impact of the Essex Growth Programme and suggest lessons learned/good practice/opportunities which should be taken forward in subsequent delivery.

3.1.2 The following supporting documents are provided that form part of this specification:

- Appendix 1 – Essex Growth Programme Logic Model
- Appendix 2 – ERDF Summative Assessment Guidance
- Appendix 3 – ERDF Summative Assessment Guidance Appendices

3.1.3 The following key sections should be included in the evaluation report with content of the sections answering the questions and providing analysis with comment as outlined below:

***Project Context:***

- What was the project seeking to do?
- What was the economic and policy context at the time that the project was designed?
- What were the specific market failures that the project was seeking to address? Was there a strong rationale for the project?
- Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?
- Were the targets set for the project realistic and achievable?
- How did the context change as the project was delivered and did this exert any pressures on project delivery?
- Bearing in mind any changes in context or weaknesses in the project design / logic model, was it reasonable to expect the project to perform well against its targets?

***Project Progress:***

- Has the project delivered what it expected to in terms of spend and outputs?
- What are the factors which explain this performance?
- Has the project achieved what it set out to do?

***Project Delivery Management:***

- Was the project well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?
- Has the project delivered its intended activities to a high standard?
- Could the delivery of the project have been improved in any way?
- For projects with direct beneficiaries: did the project engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the project focused on the right beneficiaries?
- How were project activities perceived by stakeholders and beneficiaries? What were their perceptions of the quality of activities / delivery?
- To what extent have the horizontal principles been integrated into and shaped delivery?

***Project Outcome and Impact:***

- What progress has the project made towards achieving the outcome and impacts set out in its logic model?
- To what extent are the changes in relevant impact and outcome indicators attributable to project activities?
- What are the gross and net additional economic, social and environmental benefits of the project?
- Can these benefits be quantified and attributed to the project in a statistically robust way?
- To what extent has the project contributed to the achievement of ERDF programme result indicators?

- What are the main sources of Strategic Added Value that the project has created?

***Project Value for Money:***

- Provide a brief analysis of the value for money that the project has provided and, where possible, benchmarks against other similar interventions.

***Conclusions and Lessons Learnt:***

- Provide a brief description of the strengths and weaknesses of the project
- Use quantitative data to illustrate your conclusions

3.1.4 A draft report is required by 31st January 2019 with a final report by 15<sup>th</sup> March 2019.

## **4 REQUEST FOR COMPANY INFORMATION**

### **4.1 Company details**

4.1.1 You are requested to provide the following written information about your company as an additional Appendix should any of the following points apply:

- Please provide details of any past/present employment with Nwes, of any of the directors, partners or associates. This should include details of name, department, post held and dates of employment.
- If any of the Directors, partners or associates is related to any member of staff employed by Nwes, give details of the name, department, post held, relationship and dates of employment.
- Details of any director, partner or associate who has/have been involved with any company which has: become bankrupt; made a composition with its creditors; had a winding up order made; had a resolution for voluntary winding up passed; had a proposed liquidator, receiver or manager appointed; or, had an administrator's order made. These details must include the person's name, company name, position in the company and date of event.

### **4.2 Financial Information and Due Diligence**

4.2.1 For businesses trading 18 months or longer a copy of your latest annual accounts must be submitted as an Appendix. If your company is a subsidiary, then a copy of your Parent Company's annual accounts must also be submitted.

4.2.2 We welcome responses from new businesses. If you have been trading for less than 18 months you should submit one of the following Appendices in support of your response:

- Latest available management accounts including Profit and Loss and Balance Sheet
- Copies of latest 3 months of Business Bank Statements.

4.2.3 Nwes may take up credit references if you choose to Tender.

4.2.4 Due Diligence checks will be undertaken on a Tenderer including Online / Social media searches of the organisation, Directors/Owners and review of any previous trading relationship with Nwes.

4.2.5 The Tenderer should have appropriate Insurance levels in place or be prepared to put them in place should they be successful. Copies of cover levels should be provided to Nwes upon request.

## **5 CONTRACTS**

### **5.1 Contracting arrangements**

5.1.1 A contract will be agreed once the successful contractor is appointed based on this specification and the Tenderer's response.

5.1.2 The successful contractor will be required to sign a data sharing agreement as part of the contractual arrangements.

5.1.3 All data obtained as part of the evaluation must be provided to Nwes for retention. Copies held by the evaluators must be destroyed within 3 months of the final report completion.

## 6 CONFIDENTIALITY STATEMENT

Norfolk & Waveney Enterprise Services Ltd (Nwes)

### INVITATION TO TENDER FOR THE PROVISION OF THE ESSEX GROWTH PROGRAMME EVALUATION REPORT

To be signed by the applicant, a partner or authorised representative in his/her own name and on behalf of the business. Please note that the term "business" refers to: sole proprietor, partnership, incorporated company, co-operative as appropriate.

I/We accept that no part of this Invitation to Tender document may be reproduced in any material form (including photocopying or storing it in any medium by electronic means) without the written permission of the Copyright owner except in accordance with the provisions of the Copyright, Design and Patents Act 1988. Application for the Copyright owner's written permission to reproduce any part of this Invitation to Tender document should be addressed to the Individual identified in Section 1.1.2 of the Invitation to Tender

I/We accept that the information supplied in this Invitation to Tender, the draft contract, and the tender is confidential and will not be revealed to any third party except where this is necessary for the provision of the tender or the completion or operation of the contract.

SIGNED ON BEHALF OF NORFOLK & WAVENEY ENTERPRISE SERVICES LTD (NWES)			
Signed		Print name	Andrew Wilson
Position	Regional Director	Date	3 <sup>rd</sup> December 2018

SIGNED ON BEHALF OF			
Signed		Print name	
Position		Date	/ /

## 7 DECLARATION REALTING TO COLLUSIVE TENDERING

Norfolk & Waveney Enterprise Services Ltd (Nwes)

### INVITATION TO TENDER FOR THE PROVISION OF THE ESSEX GROWTH PROGRAMME EVALATION REPORT

- I. The tender submitted herewith is a bona fide tender, intended to be competitive.
- II. We have not fixed or adjusted the amount of the tender under or in accordance with any agreement or arrangement with any other person.
- III. We have not done and we undertake that we will not do at any time before the hour specified for the return of the tender any of the following acts:
  - communicating to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender (except where the disclosure in confidence, of the approximate amount of the tender was essential to obtain an insurance premium quotation required for the preparation of the tender):
  - entering into any agreement with any other person that he shall refrain from tendering or as to the amount of any tenders to be submitted; and
  - offering or paying or giving or agreeing to give any sum of money or valuable consideration directly or indirectly to a person for doing or having done or causing or having caused to be done in relation to any other tenders any act or thing of the sort described above.

#### IN THIS CERTIFICATE:

- I. *person* includes any person and any body or association corporate or incorporate.
- II. *any agreement or arrangements* includes any transaction of the sort described above, formal or informal and whether legally binding or not.

Full legal name of tenderer			
Signed		Print name	
Position		Date	/ /

(same signatory as in Form of Tender in Section 8)

## 8 FORM OF TENDER

Norfolk & Waveney Enterprise Services Ltd (Nwes)

INVITATION TO TENDER FOR THE PROVISION OF THE ESSEX GROWTH PROGRAMME EVALUATION REPORT

I/we		(full legal name of tenderer)
of		(address)

(being the tenderer's principal place of business or registered office)

Hereby tender for EGP005 - Essex Growth Programme Evaluation Report and offer to perform the Service at the prices shown in the attached Tender Documentation.

I/We confirm that this is a Bona Fide Tender.

I/We acknowledge that Nwes is not bound to accept the lowest or any tender.

I/We understand that the successful tenderer will be required to execute a formal agreement and until the execution of the formal agreement all correspondence and negotiation between us and Nwes remains subject to contract.

Signed		Print name	
Position		Date	/ /

(to be signed on behalf of the tenderer by a partner if the tenderer is a firm or by a director or other person authorised to bind the company if the tenderer is a company)